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Military Market

MAGAZINE FOR THE MILITARY RESALE SYSTEM

ARMY TIMES PUBLISHING COMPANY

MAY 1989 $4.00

Old Wine in New Bottles

AAFES takes over the package stores

An Overview of the Military Liquor Business

An Interview with the New Head of Marine Corps Commissaries

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serving the military resale system

EDITOR
Nancy Tucker
MANAGING EDITOR
Robert A. Devaney
ASSOCIATE EDITORS
Marie E. Ferrey, Karen M. McBeth
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Pattie Lykins
NEWS SERVICE
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John Burlage, Rick Maze,
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GRAPHICS EDITOR
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Kate Patterson, chief;
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CIRCULATION MANAGER
Andrew J. Wall
ADVERTISING PRODUCTION
Phyllis King
EDITORIAL PRODUCTION
Cynthia Aldridge, Don Fonton

EXECUTIVE/EDITORIAL
6883 Commercial Drive
Springfield, Virginia 22159-0210
(703) 750-8676
FAX # (703) 750-8622
ADVERTISING SALES
1 Citicorp Center
153 East 53rd Street
New York, New York 10022
(212) 753-1040

VICE PRESIDENT–EDITORIAL DIRECTOR
James S. Doyle
VICE PRESIDENT–ADVERTISING
Nat Kornfeld
NATIONAL SALES MANAGER
Ed Walsh

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11 – Funds for AAFES transportation budget will get moved.

news

12 – AFCOMS takes bids for data on all commissaries.

Cashiers get pay relief in D.C. and Mass.

Personnel relief has come for commissaries in the high-cost areas of Boston and Washington, D.C., MILITARY MARKET has learned.

The Office of Personnel Management has approved an accelerated pay scale for General Schedule cashiers — sales clerks, job series 2091 — in Army, Air Force and Navy stores in or near those two cities.

Commissaries in the two areas have had trouble recruiting checkers, because the local unemployment rate is close to 0 percent. The GS salaries can't compete with those wages paid by other retail food outlets.

The Air Force and the Army have quietly worked with OPM to find an alternative to the current GS scale, which pays the same rate regardless of geographic area. *[See chart on page 8.]*

In Eastern Massachusetts, the new scale went into effect the first day of the first pay period beginning on or after Nov. 28, 1988. It applies to grades GS-2 through GS-8.

For metropolitan Washington, D.C., commissaries received notice of the policy during the week of April 10, but it is in effect retroactively, beginning on the first day of the first pay period after March 12. The accelerated scale in this area is for GS-1 through GS-6 cashiers.

Air Force Col. Frank Dooley, director of the Northeast Region of AFCOMS, told MILITARY MARKET that, before the raise, he had to bring in eight or 10 military personnel on temporary duty tours to the Hanscom AFB store in order for it to operate. Now, Hanscom has no shortfalls in cashiers.

The higher pay scale is in effect in the following stores, among others: Hanscom AFB, Mass.; Fort Devens, Mass.; Cameron Station, Va.; Bolling AFB, Md.; Andrews AFB, Md.; Fort McNair, D.C.; Walter Reed AMC, D.C.; Fort Belvoir, Va.; and Fort Myer, Va.

Bad earnings for AAFES means RIFs for some buyers

AAFES' poor 1988 earnings performance is forcing the agency to cut back on personnel. Some regional buyers have already been eliminated at the Southeast Exchange Region.

Although the Army and Air Force Exchange Service's $6.2 billion sales were slightly higher than 1987's, earnings dropped an estimated 18 percent, according to Brig. Gen. Jeffery Kahla, the agency's commander.

Earnings slipped from $260 million in 1987 to $214 million in 1988, he said. To make up for the loss in earnings, AAFES is cutting back on personnel wherever feasible, Maj. James Heaberg, spokesman for AAFES told MILITARY MARKET..

The first region to trim its staff has been SEER. Purchasing staff are being eliminated in two categories — hardlines and softlines. Similar actions are expected elsewhere. "The personnel cutback is likely to expand to other regions," Heaberg added.

SEER will be left with only two employees in hardlines and two in softlines. One will be a UA (management) staffer and the other an HPP (hourly pay plan) staffer. They will serve as liaisons between the region and Dallas' headquarters. They will not have any buying authority, said Heaberg.

Starting May 1, headquarters buyers for hardlines and softlines will do all purchasing for SEER. "No buying [for hardlines or softlines] will be done at the region level," Heaberg said.

Consumables purchasing in SEER will not be affected. The buyers who remain will continue consumables purchasing at the region level.

Hayes to head up DPSC

Brig. Gen. James S. Hayes, commander of the Troop Support Agency, will transfer to the Defense Personnel Support Center this summer to replace retiring Commander Maj. Gen. John H. Voorhees.

Voorhees' retirement should be final this summer, although the exact date had not been set as of press time. The transition from Voorhees to Hayes follows the DPSC custom of alternating the command among the armed forces. Voorhees is Air Force; Hayes is Army.

Voorhees has been head of DPSC since August 1986.

DoD: AAFES can run overseas banks by 1994

Defense Department Comptroller Clyde O. Glaister has recommended that the Army and Air Force Exchange Service begin administering the military's overseas banking program by fiscal 1994.

In a March 31 letter to Rep. Les Aspin, D-Wis., chairman of the House Armed Services Committee, Glaister said that transferring the banking program to AAFES is possible. However, he acknowledged that "such a transfer is not feasible in the short run."

There are three reasons for this: (1) AAFES is currently occupied with integrating morale, welfare and recreation activities (such as package stores) into its program; (2) AAFES wants to be able to operate military banking facilities on a profitable basis; and (3)

BANKING, continued on page 40

FAMILIES

Use of WIC vouchers up at stores

While the dollar value of food stamps redeemed in commissaries is mostly declining or remaining the same, redemptions of Woman, Infant and Children vouchers are increasing. However, some services have trouble tracking the WIC figures at headquarters.

According to the Air Force Commissary Service, because the Woman, Infant and Children vouchers program is not national, it varies from state to state.

Therefore, not all commissaries are required to report redemption figures. AFCOMS is unable to maintain a complete record of the information. The Navy Resale and Services Support Office also doesn't keep headquarters records of WIC redemptions.

The Troop Support Agency, which does release overall WIC figures, says that the WIC program is conducted only in the United States and Puerto Rico. The program is sponsored by the U.S. Department of Agriculture and serves to improve the health and nutrition of pregnant, breast-feeding and post-partum women and infants and children under the age of five.

TSA said individuals must live in an area where the WIC program operates, meet individual state income level requirements and be declared a nutritional risk by a medical official at their local WIC agency to be eligible.

Participants purchase authorized foods, including cereals, juices, milk, eggs and infant formula, using the specially printed WIC vouchers.

Fifty-two Army commissaries participate in the WIC program.

Redemption of Food Stamps and WIC Vouchers in Commissaries

FOOD STAMPS

Agency	1st Quarter Fiscal 1989	1st Quarter Fiscal 1988	Fiscal 1988	Fiscal 1987
AFCOMS	$1,003,767	$857,577	$3,404,019	N/A
Marines	107,316	114,672	391,578	$392,936
NAVRESSO	504,390	566,334	2,127,061	2,332,648
TSA	1,356,933	1,385,325	4,900,000	4,600,000
Coast Guard	897	18	N/A	N/A
Total	**$2,973,303**	**$2,923,926**		

WIC VOUCHERS

Agency	1st Quarter Fiscal 1989	1st Quarter Fiscal 1988	Fiscal 1988	Fiscal 1987
Marines			$333,346	$262,954
TSA			2,100,000	1,500,000

SOURCE: Commissary agencies

Comparative Pay Rates for Cashiers

Grade	Mass.	D.C.	Regular
GS-1	N/A	$12,445	$10,213
GS-2	$14,169	13,343	11,484
GS-3	15,150	15,039	12,531
GS-4	16,092	15,943	14,067
GS-5	16,972	17,313	15,738
GS-6	18,712	18,712	17,542
GS-7	20,143	N/A	19,493
GS-8	22,310	N/A	21,590

NOTE: Rates shown are Step 1 of each grade, for GS-2091 sales store clerk positions. Similar differences are seen in other steps of the same grades. Figures include the 4.1 percent federal pay hike which was effective in January 1989.

INDUSTRY

ALA survey lists biggest problems

Vendor stocking, frequent delivery, late payments dominate list.

Vendor shelf stocking, frequent delivery and late payments are the issues of primary concern to members of the American Logistics Association, according to a recent survey.

As of mid-April, ALA had received 137 responses to its February letter to members, which asked them to name the "top three problems" that the association should address in the next 12 months.

Bill Irwin, ALA's operations director, told MILITARY MARKET that it would probably take the staff until the end of May to analyze all the replies, which have been grouped together according to like topics.

Vendor shelf stocking was the most frequently listed problem area, while frequent delivery was second and late payments was the third most-cited issue. The three topics were "by far and away the most dominant" of the many answers, Irwin said.

Other topics that need addressing, according to the replies, are teamwork between industry and commissary personnel, deliveries, pricing systems, understaffing of commissaries and stock lists — both master and regional. Irwin said there were also comments on how ALA meetings could be improved.

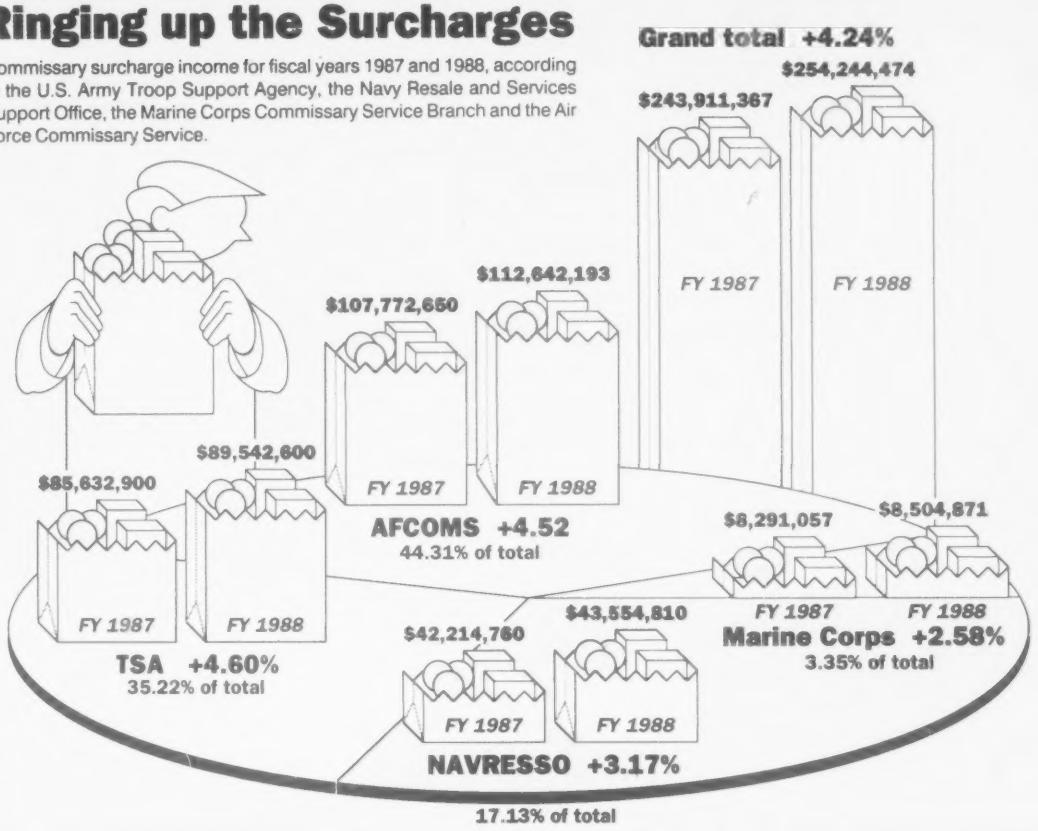
The first thing ALA will do is take the pile containing vendor shelf stocking suggestions and read them to "see if anybody's got any innovative thoughts on what we should be doing," Irwin said.

He said the staff will read each response and use the suggestions for meeting topics and approaches.

Responses came from industry and military members alike.

Ringing up the Surcharges

Commissary surcharge income for fiscal years 1987 and 1988, according to the U.S. Army Troop Support Agency, the Navy Resale and Services Support Office, the Marine Corps Commissary Service Branch and the Air Force Commissary Service.



The Complete Breakdown by Region or Office

	Region/Complex	Fiscal 1988	% of Total	Fiscal 1987	% Change
TSA	MWCOR	$20,011,600	22.35	$19,652,200	+ 1.83
	NECOR	15,988,700	17.86	15,288,800	+ 4.58
	SECOR	21,197,400	23.67	20,326,900	+ 4.28
	WCOR	12,877,200	14.38	12,407,000	+ 3.79
	EURCOR	19,467,700	21.74	17,958,000	+ 8.41
NAVRESSO	Auburn	$2,905,182	6.67	$2,767,311	+ 4.98
	Davisville	2,978,666	6.84	2,829,553	+ 5.27
	Jacksonville	5,760,643	13.23	5,743,031	+ 0.31
	Mechanicsburg	2,282,002	5.24	2,157,107	+ 5.79
	Norfolk	5,316,101	12.21	5,146,231	+ 3.30
	Oakland	4,348,355	9.98	4,316,745	+ 0.73
	Pearl Harbor	2,982,108	6.85	3,030,809	- 1.61
	Pensacola	3,823,900	8.78	3,762,913	+ 1.62
	San Diego	8,804,917	20.22	8,414,465	+ 4.64
	Overseas	4,352,936	9.99	4,046,595	+ 7.57
Marine Corps	East Coast	$4,218,032	49.60	$4,153,285	+ 1.56
	West Coast	4,286,839	50.40	4,137,772	+ 3.60
AFCOMS	California	$14,389,471	12.77	$14,138,261	+ 1.78
	Delta Gulf	12,904,316	11.46	12,886,983	+ 0.13
	North Central	11,104,042	9.86	10,542,979	+ 5.32
	Northeast	11,960,589	10.62	11,668,943	+ 2.50
	Northwest	7,961,049	7.07	7,451,758	+ 6.83
	South Central	13,967,434	12.40	13,702,336	+ 1.93
	Southeast	9,677,097	8.59	9,022,678	+ 7.25
	Southwest	11,210,172	9.95	10,880,993	+ 3.00
	Pacific	8,979,927	7.97	8,025,011	+ 11.90
	European	10,488,096	9.31	9,452,708	+ 10.95

NOTE: Agency percent total represents percentage of grand total for military commissary surcharge income during fiscal 1988. Consolidated

Marty Baumann

Freeze Frame

While lens shutter cameras have zoomed past SLRs in sales, overall camera sales in the exchanges have stalled for the moment.

By KAREN McBETH
Associate Editor

Camera sales in exchanges seem to be stuck in automatic rewind. The tremendous growth in the industry for lens-shutter (point-and-shoot) 35mm models hasn't clicked with fewer camera purchases on the whole.

The Navy Resale and Services Support Office reports that worldwide sales for its camera department were down 7.5 percent in fiscal 1988, which ended Jan. 20.

In the Army and Air Force Exchange Service, worldwide photographic photo processing sales dropped 8.6 percent during the fiscal year, which also ended in January. Sales, which include accessories and mail order, were $93,040,000. This was 1.9 pecent of AAFES' worldwide sales, down from 2.2 percent ($101,795,000) the previous fiscal year.

B.L. "Ole" Olson, NAVRESSO's senior buyer for cameras, film and accessories, attributes the decrease, in part, to the trend toward fewer sales of high-ticket 35mm single-lens reflex (SLR) cameras. He also cites the declining instant picture market and competition from camcorders as reasons for the overall slowdown in camera sales.

The Photo Marketing Association has reported that the two most popular camera models are the 35mm auto-focus and the 110. Olson finds corresponding trends in Navy exchanges.

Disc cameras are "going the way of the 126 cameras," Olson reports. Unit purchases were down 48.1 percent in fiscal 1988. "With the decline in the disc market, many people are going back to the old reliable 110." NAVRESSO's fiscal 1988 purchases of 110s from ConUS sources totalled 38,030 — an increase of 52.9 percent over the previous year.

Olson said the market for instant cameras has been declining for a number of years because of competition from 60-minute photo processing, 35mm point-and-shoots and camcorders. Unit purchases of instants for 1988 were down 8.8 percent, and dollar sales increased just 0.4 percent be-

Specialty Films Promise High Speed Growth

Two new specialty films have been shining in the media: Kodak's Ektar and Fuji's Reala.

The *Wall Street Journal* reports that they are targeted toward advanced amateur photographers, a group which uses an estimated 400 million rolls of film a year and makes up about 20 percent of users of 35mm cameras.

The new films will sell for about 15 percent to 20 percent more than normal color rolls. Ektar will be available in ASA 25 and ASA 1000. Reala will come in the more popular ASA 100.

The intention is for the films to be sold in specialty camera stores, but Ektar will also be available in exchanges, where Jim Tait says it will have a 30-percent premium. Ektar was introduced last fall in Europe, and it has done well there: "Sales of Ektar in Europe are beyond our best possible estimates," Tait said.

Ektar 25 can be blown up with "virtually no grain," Tait explained. The 1000 film allows night colors to photograph more naturally. He says the ASA 25 can only be used in one auto focus SLR in the market that he knows of: the Kodak S1100. Because of its sensitivity, some reports revealed, it may require a tripod or flash in all but bright sunlight, and some zoom lenses may not work.

Reala can be used in point-and-shoot cameras. It gives richer colors than normal color film and can distinguish between shades and textures. However, Fuji will limit its sale to specialty stores, hoping to minimize any impact on sales of other Fuji film, according to the *Journal*.

NAVRESSO will carry only Ektar, "due to a sole source contract." AAFES will carry Ektar 25 and Ektar 1000 film beginning in late spring.

According to *Advertising Age*, Eastman Kodak has an 80-percent share of the $2-billion U.S. conventional film category; Fuji has a 10-percent share. — ***K.M.***

cause of price increases.

Industry analysts agree that lens/shutter cameras are still experiencing growth, while manual SLRs are in a slump. Navy exchanges follow the trend: Unit sales of SLRs were down 35.3 percent, while dollar sales dropped 44.6 percent. Of the SLRs that were purchased, autofocus models accounted for 51.1 percent of total unit sales and 63.7 percent of the dollar sales.

By contrast, NAVRESSO purchased 32.5 percent more lens/shutter cameras in 1988. AAFES reports that it carries only five SLR models on its master stock list. The rest are lens/shutter 35mm, cartridges and Polaroids.

According to NAVRESSO's Olson, "It is too early to predict how the camera market will be in resale activities during 1989.

"However, if the results of the Super February Sale are any indication, 1989 could be a good year."

WHAT'S NEW FROM THE MAJORS

The major camera manufacturers report a plethora of new cameras, most of which are lens/shutter 35mm models. Here's a sampling, listed by manufacturer:

☐ **Eastman Kodak:** Jim Tait, director of military sales, United States Division, said that since Kodak got into the 35mm business three years ago, the company has expanded its line from only two models to the six now available.

This year, Kodak has discontinued its K series and expanded its S series as a replacement. Because cameras are constantly being improved, the life of a model is about 24 to 36 months, Tait said.

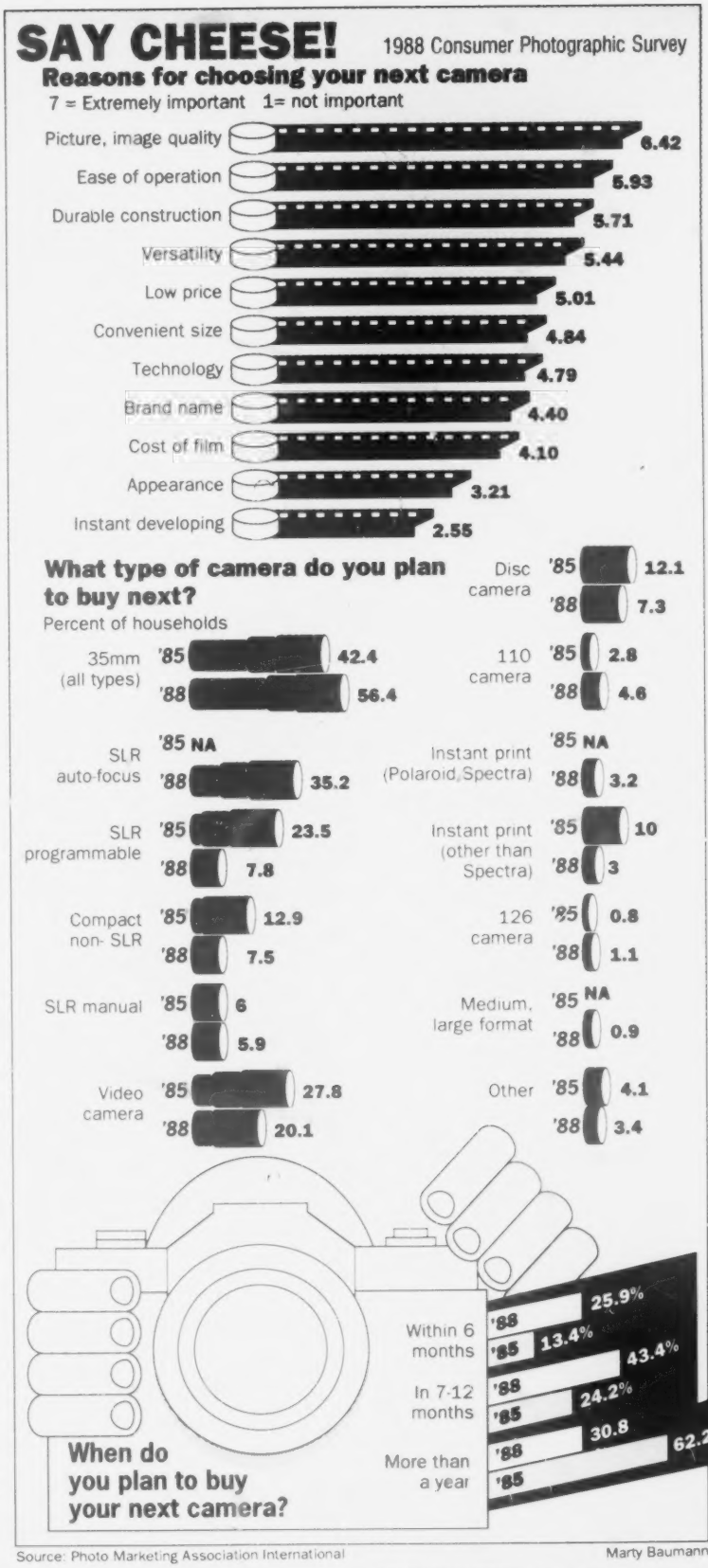
All of the S-series cameras are either automatic focus or focus-free. New this year are the S300 (commercial retail less than $90), the S500 (commercial retail less than $190), the S900 Tele 35 (commercial retail less than $240) and the S1100 (commercial retail less than $260).

Kodak also has the Explorer all-weather 35mm and the Mickey-matic 110 camera, promoted last fall and this spring for Mickey Mouse's 50th birthday.

Tait says Kodak's best seller in the military is the S100 35mm lens/shutter, introduced last year at the PMA show.

☐ **Fuji Photo Film USA, Inc.:** Fuji has expanded its Discovery 35mm line with the Discovery 60 and Discovery 160, both autofocus models. The Discovery 2000 was introduced in February.

Robert Ferguson, military sales manager, says that 35mms are on the upswing, while cartridges are not. Tom Shay, director of corporate com-


SAY CHEESE!
1988 Consumer Photographic Survey
Reasons for choosing your next camera
7 = Extremely important 1= not important
Picture, image quality 6.42
Ease of operation 5.93
Durable construction 5.71
Versatility 5.44
Low price 5.01
Convenient size 4.84
Technology 4.79
Brand name 4.40
Cost of film 4.10
Appearance 3.21
Instant developing 2.55
What type of camera do you plan to buy next?
Percent of households
35mm (all types) '85 42.4 '88 56.4
SLR auto-focus '85 NA '88 35.2
SLR programmable '85 23.5 '88 7.8
Compact non- SLR '85 12.9 '88 7.5
SLR manual '85 6 '88 5.9
Video camera '85 27.8 '88 20.1
Disc camera '85 12.1 '88 7.3
110 camera '85 2.8 '88 4.6
Instant print (Polaroid, Spectra) '85 NA '88 3.2
Instant print (other than Spectra) '85 10 '88 3
126 camera '85 0.8 '88 1.1
Medium, large format '85 NA '88 0.9
Other '85 4.1 '88 3.4
When do you plan to buy your next camera?
Within 6 months '88 25.9% '85 13.4%
In 7-12 months '88 43.4% '85 24.2%
More than a year '88 30.8 '85 62.2%

Source: Photo Marketing Association International

Marty Baumann

Marketers Not Disposing of Disposables

Although the Photo Marketing Association reported last year that only 3.3 percent of all households had ever used a disposable camera, manufacturers remain optimistic about the little boxes.

"The disposable in both [the military and retail] trades all of a sudden is starting to find its niche," said Fuji's Bob Ferguson. "Consumers are just now beginning to discover what it is and what it does."

Fuji markets Quik Snaps — 35mm disposables — with and without a flash. The company has been promoting these cameras, educating users about the quality and possible uses. The company's Tom Shay said consumers sometimes assume a cheaper camera takes poorer pictures, but results with the disposables are "surprisingly good."

Kodak's Jim Tait admitted that disposables do have limited use, for "special situations." "We find it's a great camera for a kid's gift, or someone taking on photography for the first time." Another use is at theme parks, when people find they've forgotten their cameras.

Kodak now has a 35mm version of its Fling camera, which used to come only with 110 film. Tait said that, because of the growing interest in 35mm, the Fling 35 is the camera featured in exchanges.

Now, "disposables are taking pictures where often they [consumers] would've left the camera at home," said Fuji's Shay, director of corporate communications. "We look at it as additional business. It's expanding the market."

According to Shay, sales of the disposables represent a "good percent" of the firm's total sales. He said they entered a "strong and continued growth pattern" beginning last spring. — *K.M.*

munications, says lens-shutter cameras outsell SLRs by a ratio of 5-1.

According to data from NAVRESSO, Fuji supplies Navy exchanges with the most camera units of any manufacturer.

☐ **Olympus Corp:** Olympus began selling its cameras to exchanges on the open market early in 1989, when its GSA contract ran out. According to Vince Marino, consumer services supervisor, new cameras include the Infinity Twin, an auto focus 35mm L.S which was introduced in September. It didn't start shipping until February because the company had trouble meeting demand on other products. The Infinity Super Zoom 300 is an auto-focus 35mm L.S, as is the Quick Shooter Zoom.

☐ **Minolta:** The Maxxum 3000i SLR came out in May of 1988 and is the smallest in the line. Spokesman John Jonny says it's fully automatic and has more flexibility for adding lenses. The commercial suggested list price is $486.

The Freedom Zoom 90 was introduced this January. It is an L.S with a zoom lens and a flash that is not totally automatic, leaving the photographer with some flexibility about using it. It has a programmed zoom, and the suggested commercial list price is $428. Deliveries began in mid-March.

☐ **Pentax:** Three new cameras were introduced during February's PMA show. Robin Allerding, military sales representative, said the Mini Sport AFII 35mm sells for $79 in exchanges. The P3N SLR replaces the P3 and will sell for $199.95 in the military. The SF1N replaces the SF1, which will be discontinued sometime in April or May, she said. The exchange price for the SF1N would be $399 for the body only or $460 with a 1.7 lens.

☐ **Canon:** The Sure Shot is Canon's best-seller in the military, according to John Ryan, military sales manager. He expects that the Sure Shot Ace (35mm, automatic L.S), which was introduced in the fourth quarter of 1988, will probably be the best seller this year. Another new camera is the Snappy EZ 35mm L.S, also introduced in the fourth quarter.

At the end of March, Canon presented the ER630 to exchanges. It's an autofocus SLR that has different program modes to suit the scene being photographed, Ryan explained. He said it will be introduced in April or May. He said Canon will have four or five other cameras to introduce in the second half of this year. MM

Navy Exchange SLR and Lens Shutter Camera Purchases

Company	Units	Dollars
Fuji	14,537	$1,417,923
Kodak	13,212	912,316
Keystone	12,477	524,974
Minolta	9,312	2,043,465
Canon	7,258	1,363,266
Pentax	6,668	1,183,706
Olympus	3,030	570,548
Vivitar	1,449	80,342
Nikon	1,376	215,186
Ricoh	1,327	208,522
Konica	1,180	69,620
Concord	400	11,770
Yashica	65	21,082

Fiscal 1988 purchases from U.S. sources only. Excludes off-shore procurements by overseas activities.
SOURCE: NAVRESSO

New NEX Items on 1989's Master Stock Assortment

Canon Sure Shot Ace ■ Fuji Discovery 60 ■ Fuji Discovery 160 ■ Kodak S900 ■ Minolta Maxxum 3000i SLR ■ Olympus Infinity Twin ■ Olympus Infinity Super Zoom ■ Pentax Mini Sport 35mm AF-II ■

Military Market index

COMMISSARIES

		JANUARY			YEAR TO DATE		
		CY'89	CY'88	% CHANGE	CY'89	CY'88	% CHANGE
	CONUS	$156,979	$157,492	-0.33	$156,979	$157,492	-0.33
	OVERSEAS	33,138	34,955	-5.20	33,138	34,955	-5.20
AIR FORCE	TOTAL	190,117	192,447	-1.21	190,117	192,447	-1.21
	CONUS	110,990	111,720	-0.65	110,990	111,720	-0.65
	OVERSEAS	42,000	42,525	-1.23	42,000	42,525	-1.23
ARMY	TOTAL	152,990	154,245	-0.81	152,990	154,245	-0.81
	CONUS	59,179	59,799	1.04	59,179	59,799	1.04
	OVERSEAS	6,842	6,612	3.48	6,842	6,612	3.48
NAVY	TOTAL	66,021	66,411	-0.59	66,021	66,411	-0.59
	CONUS	13,314	13,200	0.86	13,314	13,200	0.86
	OVERSEAS	285	284	0.35	285	284	0.35
MARINE CORPS	TOTAL	13,599	13,484	0.85	13,599	13,484	0.85
	CONUS	256	242	5.79	256	242	5.79
	OVERSEAS	316	318	-0.63	316	318	-0.63
COAST GUARD	TOTAL	573	560	2.32	573	560	2.32
	CONUS	$340,718	342,453	-0.51	340,718	342,453	-0.51
ALL	OVERSEAS	$82,581	84,694	-2.49	82,581	84,694	-2.49
COMMISSARIES	TOTAL	$423,299	$427,147	-0.90	$423,299	$427,147	-0.90
GROCERY STORES	*U.S.*[1]	*$25,742*	*$24,302*	*5.93*	*$25,742*	*$24,302*	*5.93*

EXCHANGES

		JANUARY			YEAR TO DATE		
		CY'89	CY'88	% CHANGE	CY'89	CY'88	% CHANGE
	CONUS	$237,650	$220,524	7.77	$237,650	$220,524	7.77
	OVERSEAS	200,477	198,752	0.87	200,477	198,752	0.87
AAFES	TOTAL	438,127	419,277	4.50	438,127	419,277	4.50
	CONUS[2]	79,272	83,819	-5.42	79,272	83,819	-5.42
	OVERSEAS[2]	37,788	40,117	-5.81	37,788	40,117	-5.81
NAVY	TOTAL[2]	117,060	123,936	-5.55	117,060	123,936	-5.55
	CONUS	18,465	18,898	-2.29	18,465	18,898	-2.29
	OVERSEAS	3,897	4,489	-13.19	3,897	4,489	-13.19
MARINE CORPS	TOTAL	22,362	23,386	-4.38	22,362	23,386	-4.38
	CONUS[3]	5,263	5,237	0.50	5,263	5,237	0.50
	OVERSEAS[3]	392	390	0.51	392	390	0.51
COAST GUARD	TOTAL[3]	5,655	5,627	0.50	5,655	5,627	0.50
	CONUS[3]	838	1,239	-32.36	838	1,239	-32.36
	OVERSEAS[3]	1,066	1,576	-32.36	1,066	1,576	-32.36
MAIL ORDER	TOTAL[4]	1,904	2,815	-32.36	1,904	2,815	-32.36
	CONUS	$341,488	$329,717	3.57	$341,488	$329,717	3.57
	OVERSEAS	$243,620	245,324	-0.69	243,620	245,324	-0.69
ALL EXCHANGES	TOTAL	$585,108	$575,041	1.75	$585,108	$575,041	1.75
DEPARTMENT STORES	*U.S.*[1]	*$9,191*	*$8,618*	*6.65*	*$9,191*	*$8,618*	*6.65*

1) SOURCE: U.S. Department of Commerce. 2) Does not include sales of ship stores. 3) MM estimate, based on official data. 4) Includes consolidated sales for all services, including Coast Guard. NOTE: Individual figures may not add to totals because of rounding. All sales are expressed in millions (add 000), except grocery stores and department stores, which are in billions. Commissary sales include appropriate surcharges; exchange sales include concession volume.